



Procedures Detailed Design Guidelines

User Procedures consist of step-by-step instructions on how to use an application to complete a specific activity. User Procedures can be created with specific dialogs or with more general instructions depending on the skill level of the business representative population and the complexity of the application.

Guidelines

- ✓ When writing procedures, it is critical to provide enough detail, so that there is no room left for questions.
- ✓ Introduce the procedures with a brief statement about the purpose of the task or policy change *not* the purpose of the procedure.
- ✓ Know the audience for whom you are writing and write to their level of understanding.
- ✓ Avoid using jargon and words or acronyms not commonly used by the audience for whom you are writing.
- ✓ Begin each step with an action verb. Use precise verbs, such as "enter," "underline," or "tell."
- ✓ Write in the present tense (i.e. "Press 'Z'. The red warning light should be blinking." NOT "When you press 'Z' the red warning light will blink.>").
- ✓ Use short sentences. Keep it simple. Present only one step/task per sentence.
- ✓ Do not combine too much information and include only step-by-step actions.
- ✓ Tell who does what and when. The "why" should only be covered in the introductory statement of the procedures or when the reader might question the purpose of a step or task.
- ✓ Break down a system/process into logical cycles of related activities and indicate specific start and end points of those cycles.
- ✓ Write to cover each activity within a cycle, from beginning to end.
- ✓ Organize the procedure steps in the sequence that they are performed.
- ✓ Make sure objects mentioned and other people or functions described are clear to the reader.
- ✓ Walk through the steps mentally. Can you follow the procedures?
- ✓ Avoid over-personalizing procedures (i.e., "Take the reports to Thelma on the 6th floor by 2 p.m. on Wednesday").



- ✓ State directions in a positive tone. Do not say "Keep off the grass" when you can say "Stay on the sidewalk."
- ✓ Use "Type" for directing multiple keystrokes (i.e., Type: last name).
- ✓ Use "Press" for directing single keystrokes (i.e., Press: ENTER).

Procedures Detailed Design Description

Process Name: The name of the higher level process of which the Business Procedure is a part.

Activity Name: The name of the activity of which the Business Procedure is a part.

Business Procedure : The number and name of the Business Procedure to be described.

Policies: The number and name of related Business Policies. Where the template is electronic, this should provide a dynamic link to the detailed Business Policy materials.

Involved Personnel in Procedure: List of those people (the roles) who will actually execute the Business Procedure to be execute.

Schematic: A graphical representation of the Business Procedure to be executed.

Description of Business Procedure: Textual Description of the steps executed when carrying out the Business Procedure.

Business Scenario where Procedure and Policies take effect: Typical Business Scenario description where the Business Procedure would take place.

Tasks within Business Procedure: List of those tasks within the Business Procedure (indicated by the Schematic).

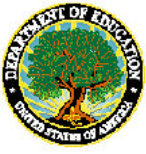
User Procedures: List of those User Procedures associated with each task in the Business Procedure. Provide dynamic link or cross-reference if manual.

Suppliers/Inputs: Those inputs and/or suppliers which are triggers or necessary inputs for the Business Procedure to be executed.

Output of Procedure: Textual Description of expected output of the Business Procedure when executed.

Name of Resource: Name of personnel, systems, and other resources used in executing the Business Procedure.

Tasks performed using this Resource: List of tasks within procedure (those seen graphically on the schematic) to be associated with each resource.



Number of transactions per day: Number of times the resource performs per day.

Related KPI's/Metrics: A list of those Activity level metrics relating to the execution of the Business Procedure.

Critical Costs within Procedure: A list of any major cost drivers involved in the execution of the Business Procedure.

Exceptions within Business Procedure: A list of any cases where the controls and tasks within the Business Procedure can change.



Procedures Detailed Design Template

IPT Name:		
Deliverable Name: Procedures Detailed Design Template		Date Completed:
Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
Task Order Number:		

Process Name:

Activity Name:

Business Procedure:

Policies:

Involved Personnel in Procedure:

Insert Business Procedure here.

Figure 1

Description of Business Procedure

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Business Scenario where Procedure and Policies take effect

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Tasks within Business Procedure

User Procedures



**Department of Education
Student Financial Assistance**

Task 1:	1.1
Task 2:	1.2
Task 3:	1.3
Task 4:	



Suppliers/Inputs	Output of Procedure

Involved Resources:

Name of Resource	Tasks performed using this resource	Number of transactions per day

Related KPI's/Metrics

Critical Costs within Procedure

Exceptions within Business Procedure